

Statement of Work

I. Title: Support for EPA's State Climate and Energy Program
Contractor Name: ICF International
Contract #: EP-W-12-010
POP: April 1, 2015 - March 31, 2016
WA #: 3-37

II. Work Assignment Manager (WAM):

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Alt. WAM Name: Julia Miller
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III. Background:

The mission of the Environmental Protection Agency's Climate Protection Partnerships Division (CPPD) is to reduce emissions of greenhouse gases (GHGs) that contribute to global warming. CPPD forges partnerships with private and public organizations to accomplish this goal through the promotion of cost-effective energy-efficient technologies. CPPD delivers the technical information and tools that organizations and consumers need to choose energy efficient solutions and best management practices. The Division's success is dependent in part on the information management infrastructure which tracks these partnerships, and collects and disseminates information to the public.

A key CPPD program is the State and Local Climate and Energy Program run by the State and Local Branch (SLB). This program provides technical assistance, analytical tools, and peer exchange opportunities to help state, local, and tribal governments use clean energy and other strategies to reduce GHG emissions and achieve multiple environmental, human health, energy system and economic benefits. This program also runs EPA's Climate Showcase Communities; 50 local and tribal pilot projects developing cost-effect and replicable models of GHG reductions. In addition, SLB's Heat Island Reduction Program works with communities, states, public officials, industry representatives, researchers, and others to identify opportunities for implementation of heat island reduction strategies. The purpose of this work assignment is to advance the development of key program resources and tools and to provide technical assistance and program support for SLB's work primarily on state issues.

The Contractor shall submit for review and obtain approval from the EPA Work Assignment Manager (WAM) prior to use or dissemination of any and all materials produced under this work assignment, such as manuals, technical documents, and outreach materials.

IV. Description and Tasks:

Task #1: Work Assignment Administration

The Contractor shall meet with the Work Assignment Manager (WAM) to discuss the WA tasks and deliverables. This meeting can be via teleconference. The Contractor shall then prepare and submit a work plan and cost estimate for the WA consisting of project plans and budget estimates itemized for each task. The budget estimates should include breakdowns of elements by cost, professional level, subcontractors, and other direct costs. Work may begin on all tasks during preparation of the work plan, if directed by the WAM.

The Contractor shall participate in administrative meetings and/or conference calls at the written request of the WAM. The technical work of each task will be directed by the WAM. The Contractor shall participate in meetings and/or conferences calls at the written request of the WAM. The WAM will determine the date and location of these meetings.

Task #2: Increase State Understanding on EPA Power Sector Rules and the Opportunities for Energy Efficiency and Renewable Energy, and Related Issues

The Contractor shall provide logistical and technical support to EPA in organizing and facilitating six webcasts, as well as related materials. It is expected that approximately 150-250 participants (of the total roster) will participate on each webinar and each webinar will last 1.5 hours. For this task the Contractor shall:

- Assist EPA with logistics and facilitation for approximately six webinars;
- Maintain a website with relevant materials (ongoing);
- Work with EPA to promote the webinars;
- Distribute related presentation materials and other relevant information to the webinar participants; and
- Maintain a distribution list.

Task #3: Gather State Feedback on Rule and Standard Design Issues, Where Appropriate

The Contractor shall compile and synthesize feedback from meetings, written comments, reports and other avenues, as appropriate, to summarize state concerns and recommendations on rule design issues and compliance pathways that relate to energy efficiency and renewable energy, and other topics as identified.

Task #4: Assist SLB with the Design of Tools and Resources that States Can Use to Develop Plans to meet EPA Regulations and Standards

The Contractor shall assist SLB in designing and refining a toolbox of models, tools, guidance and other resources that provide states with the information they need to incorporate energy efficiency and renewable energy into their compliance plans to meet EPA regulations and standards. The Contractor shall also assist SLB in determining the best venue and approach for housing this information.

Task #5: Provide Facilitation to States as They Develop Their Compliance Strategies and Plans

As directed by SLB, the Contractor shall provide facilitation and technical assistance related to energy efficiency and renewable energy to states and/or regions as they develop their compliance strategies and plans.

Task #6: Provide Support for Policy Tracking and Advancing Benefits Quantification through Analyses, Materials and Tools

Building off of policy tracking, analysis, research, tools and benefits outreach strategy work conducted by the Contractor under Contract EP-W-09-003, the Contractor shall support SLB's effort to promote and integrate understanding on state climate change and clean energy policies, opportunities and experiences as well as the validation and/or estimation of energy, air and economic benefits into the design and implementation of climate change mitigation and clean energy options.

Under Contract EP-W-09-003, the Contractor tracked benefits information, including stories where jobs have been created that support clean energy. EPA shares these stories with states via our weekly newsletters. The Contractor shall continue to track these stories and submit in the agreed upon format, 2-3 new stories via email each week to the WAM. The Contractor shall maintain a master compilation of all the stories collected so far, making additions, deletions and edits as new information becomes available.

Additional support may be requested by the WAM through specific technical direction and shall include but not be limited to:

- Researching, tracking, analyzing and documenting the status, design, compliance mechanisms and impacts, including energy, economic and/or greenhouse gas emission impacts, of state clean energy and climate change policies across all states.
 - The EPA WAM will select the policies.
 - Products may include but not be limited to: a spreadsheet cataloguing data collected, summary factsheets, memoranda and summaries of any targeted analyses requested.
- Developing and maintaining in-reach and outreach materials, including state-specific factsheets, to:
 - Increase understanding on the implications and multiple benefits, both qualitative and quantitative, of implementing various climate and/or clean energy options;

- Raise awareness of the best practices for implementing policies and quantifying benefits, including the utilization of SLB tools and identifying/using responsibly rules-of-thumb multipliers; and
- Enhance communications by EPA and states on the benefits of and approaches to implementation of clean energy.
- Organizing, developing and/or promoting success stories or case studies to be included in EPA's case study portal and/or website.
- Providing training and/or training materials on SLB-supported tools.
- Developing new or adapting existing tools to enhance states' and locals' ability to easily quantify impacts of energy efficiency and renewable energy actions.
- Tracking and compiling stakeholder feedback on climate change regulatory options proposed or released by EPA.
- Developing clean power plan-related implementation materials, such as flowcharts and decision trees to facilitate state development of climate plans and to help EPA support states.

Product and/or tool development may require working with and/or leveraging the expertise of analysts and NGOs that support state and local functions, and other targeted groups or experts as specified by the WAM in the technical direction.

Task #7: Provide Support for and Update the Greenhouse Gas Equivalency Calculator

The Contractor shall provide support to the EPA WAM for the Greenhouse Gas Equivalency Calculator which includes but is not limited to: drafting of responses to questions that come in from users, correcting any errors or problems identified within the calculator, tracking changes to emissions factors used within the calculator and alerting EPA WAM when new factors are available; researching and drafting a list of potential updates to and any new equivalencies for the calculator for EPA peer review by late summer or early fall and coordinating with EPA's web team to ensure updates and corrections are made appropriately.

Task #8: Provide Support for Developing and/or Updating EPA's Policy and Analysis-related Publications Documents

Upon technical direction from the EPA WAM, the Contractor shall support SLB's effort to update key program resources, including the Clean Energy-Environment Guide to Action and Assessing the Multiple Benefits of Clean Energy: A Resource for States. For the Guide to Action, the Contractor shall conduct minor research projects and/or make minor text revisions as requested for up to 6 previously drafted chapters. The Contractor shall also complete any remaining work related to the update of two to three chapters on energy-air modeling and economic modeling within the Multiple Benefits Guide. The Contractor shall reformat the chapters so that the text fits into the existing layout. The Contractor may also be directed to update URL links throughout the document and repaginate it accordingly.

The Contractor shall set up a call with the EPA WAM to discuss the substance, outline and timeline for both of these projects.

Task #9: Support the Development of an EM&V Guidance for EPA's 111(d) Proposal

This Task provides Contractor support to assist EPA with the development of Evaluation, Measurement, and Verification (EM&V) Guidance for the Clean Power Plan proposal under Section 111(d) of the Clean Air Act (CAA). The portion of the 111(d) proposal that describes EPA's approach to EM&V can be found on p. 34 of the State Plans Considerations Technical Support Document (TSD): <http://www2.epa.gov/carbon-pollution-standards/clean-power-plan-proposed-rule-state-plan-considerations>. Task #19 consists of the following Contractor actions:

- Subtask 1: Project Management
 - Convene a team of technical experts to write EPA's EM&V Guidance for 111(d)
 - Schedule and participate in hour-long weekly meetings
 - Summarize meetings and provide weekly status updates
 - Initiate additional team communications as need to ensure that technical experts know their responsibilities and deadlines
- Subtask 2: Research, Information Gathering, and Decision Support
 - Conduct research, participate in technical discussions, and take all other actions necessary to identify options and approaches for how key EM&V topics should be handled in the EM&V guidance
 - For budgeting, assume research and writing of 4-page summaries on ten technical topics, TBD
- Subtask 3: Guidance Writing
 - Leverage existing technical information on key EM&V to write 150 pages of draft EM&V guidance, including chapters on:
 - General information and background
 - EM&V criteria for common EE programs
 - EM&V criteria for RE programs
 - Minimum EM&V requirements for specific EE program types
 - EM&V plans
 - EM&V reporting
 - 5 glossary topics
- Subtask 4: Guidance Editing
 - Provide for two rounds of substantive editing of draft EM&V guidance
 - Provide for two rounds of technical editing of draft EM&V guidance
 - For budgeting, assume that draft guidance is 150 pages
- Subtask 5: Outreach and Capacity Building
 - Support outreach and capacity building on EM&V Guidance by developing materials and presentations that describe EPA's approach
 - For budgeting, assume assistance is needed to plan and coordinate three webinars, write five presentations (15 slides each), and develop

five summary documents describing EPA's EM&V approach (3 pages each)

- For budgeting, assume technical experts will deliver ten presentations and travel to 3 conferences

V. QA Requirements:

Not applicable.

VI. Deliverables:

At the request of the WAM, the Contractor shall provide an interim draft deliverable as each major milestone is reached. Milestones may include: developing an outline, creating a first draft, revising the draft based on EPA/expert comments, and producing a copy edited and print-/web-ready final draft. The Contractor shall respond within two weeks to comments from the WAM on any interim draft deliverable, unless otherwise specified in the table below or through technical direction.

The Contractor shall adhere to the following schedule:

Task	Deliverable	Delivery Schedule
1	Work Plan	20 days after the effective date of the WA
2(a)	Call to discuss webinar plan and schedule for the year	April 2015
2 (b)	Hold up to six webinars	Per schedule under 2(a)
3 (a)	Summaries of Clean Power Plan comments from key stakeholders, as identified by EPA	April 2015
3 (b)	Draft replies to Clean Power Plan stakeholder comments	June 2015
4	Updated toolbox website	July 2015
5	Plan for training EPA Regional Offices on key EE/RE issues related to the Clean Power Plan	April - September 2015
6(a)	2-3 jobs articles and an updated archive of all stories added, deleted or updated to date	Friday of each week
6(b)	50 state climate and energy factsheets	TBD, as requested by WAM
6(c)	Upon technical direction of WAM, call to discuss the format of needed product(s) and the timeline for completing the task	Within 1 week of receipt of technical direction from WAM
6(d)	Draft product(s) in the format requested under 13(c)	TBD, under 13 (c)
6(d)	Final product	Within 2 weeks of receipt of comments from WAM
7(a)	Upon receipt of EPA GHG Equivalency Calculator questions, draft response for addressing question(s)	Within 5 days of receipt of question/problem related to the calculator from WAM

7(b)	List of recommended updates or additions to the EPA GHG Equivalency Calculator	TBD, as requested by WAM
7(c)	Upon technical direction, revised calculator in a format that can be posted by EPA's web team	Within 14 days of WAM approval of proposed updates/changes
8(a)	Kickoff call with WAM to discuss updates to resources	Within 5 days of start of work on task
8(b)	Summary of kickoff call held in 15(a)	TBD
8(c)	Drafts of the individual chapters and any other materials agreed to during kickoff call, as documented in 15(b)	TBD
8(d)	Revised materials	Within 7 days of receipt of comments from WAM
9(a)	Identification and recruitment of team of national technical experts	Within 3 weeks of start of work on task
9 (b)	10 summaries that are 2 pages each	TBD, as requested by WAM
9(c)	4-page summaries describing how key issues listed above will be handled in the EM&V guidance	TBD, as requested by WAM
9(d)	Materials and presentations that describe EPA's proposed EM&V approach for 111(d)	TBD, as requested by WAM
9(e)	Edits, graphics, and layout support for the final EM&V Guidance	TBD, as requested by WAM
9(f)	Responses to select public input and comment on EM&V topics	TBD, as requested by WAM

VII. Reporting Requirements:

The Contractor shall provide monthly progress reports, itemized by task, in accordance with the terms of the contract. These reports shall include hours and dollars spent by task, as well as a description of the work completed and deliverables produced. The Contractor shall provide written notification to the WAM within 30 days of when it anticipates expending 75 percent of the budgeted labor hours and/or budget dollars in the approved work plan. The Contractor shall submit work products in electronic as well as hard copy form. In addition, the Contractor shall deliver to the WAM each draft and final report in electronic format that is readable by windows-based word-processing (Microsoft Word 2013), graphics (Microsoft PowerPoint 2013), spreadsheet (Excel 2013), and database (Access 2013) programs. The Contractor shall also provide electronic copies of reports in PDF format.